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Why diversification matters when it comes to marketing
By Rob Burgess
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Advisors and other financial services professionals who rely heavily on social media to reach clients and prospects are increasingly confronting a trade-off: Stay active on channels they no longer trust, or walk away from a built-in audience.

As controversy continues to swirl around X (formerly Twitter), many advisors and others have chosen to leave the platform.

But for those who step away, the question becomes where (and how) to distribute their messages.

One firm making that shift is Leawood, Kansas-based Impact Communications, which recently left X. Jonny Swift, president and senior relationship manager, said the firm has increased its focus on LinkedIn while expanding its use of owned channels, including its blog, podcast, videos and email newsletter.

"Social media platforms are just a tool to share your content and message with a wider audience," he said. "While it's important to change with the times and maintain a presence where your community and your audience are, it's more important for each professional to become their own media machine, producing, publishing and distributing content on their own terms."

Marie Swift, founder and CEO of Impact Communications, said the firm also emphasizes "credibility marketing," including being quoted in reputable industry outlets, publishing bylined articles, submitting for and winning awards, issuing news releases, speaking at conferences and appearing as guests on webinars and podcasts.

"Social media is an amplification tool," she said. "It should not be the primary communication tool."

John O'Connell, founder and CEO of wealth management consultancy The Oasis Group (and an Impact client), said he also decided to close both his personal and professional X accounts months ago, citing concerns that the platform did not reflect his values and "had degenerated into a swamp of radicalized views and posts."

X serves as a cautionary tale for any firm that builds its professional brand on a third-party platform, he said. Any social network, whether X, LinkedIn, Facebook or another, is "run by someone else who will make decisions based on their best interest and not yours," O'Connell said.

Since leaving X, he has focused on his own newsletter, which he launched shortly after starting The Oasis Group in 2019. It now has about 170,000 subscribers.

"I consciously made the decision to build my communication network on my terms and not through someone else's platform," he said. "I am not beholden to a third-party platform for my messaging or my brand's image."

A long-term investment

Building marketing and content channels outside of social media takes time, and results often materialize slowly.

Because his clients are near-retirees and retirees, Nick George, founder of ClearMind Capital in Columbus, Ohio, said his firm has intentionally prioritized communication channels it owns rather than relying primarily on social platforms. That approach is anchored by a structured, self-hosted financial clarity assessment and by educational content that feeds into an email newsletter managed through Mailchimp, with YouTube serving as a discovery layer.

"The assessment has been the most effective way to collect contact information because it gives people something tangible and thoughtful before they ever speak with us, and it's often shared organically with family and friends," he said. "While this approach is slower than traditional marketing, the engagement and alignment are materially stronger once conversations begin."

Said Israilov, a financial planner and wealth manager at Israilov Financial in San Francisco, uses twice-monthly newsletters through MailerLite to stay connected with clients and prospects. Compared with other marketing efforts, newsletters offer a delayed return on investment, he said, but they can play an important role in long-term relationship building and staying top-of-mind.

"Newsletters are a low-cost, relationship-building marketing effort, but they are not as effective compared to in-person networking events or client referrals," he said.

Opportunities for micro-targeting

Another advantage of maintaining direct communication channels is the ability to tailor messaging to specific segments of an audience. Unlike social media, which is typically broad and algorithm-driven, direct data available to firms that own their own contact lists often proves invaluable, allowing them to market with greater precision.

About two years ago, Liv Shin, associate vice president of 49 Financial in El Segundo, California, launched a monthly newsletter hosted by Flodesk to stay connected with clients between formal review meetings. The response has been overwhelmingly positive, she said.

"Clients and prospects often reply directly to the newsletters, commenting on life

updates I've shared or asking follow-up questions on topics mentioned," she said.

The platform also allows her to subdivide her audience in ways that support more targeted outreach.

Shin said she can segment by geography, enabling her to send relevant, timely notes. For example, if she's heading to Texas, she can notify clients in the area that she'll be traveling to their city and available to meet in person.

While most subscribers are current clients, she also maintains a segment for individuals she's met through introductions or initial conversations who are still in the prospect stage.

"This allows me to stay in touch in a low-pressure, value-driven way until they're ready to re-engage," she said.